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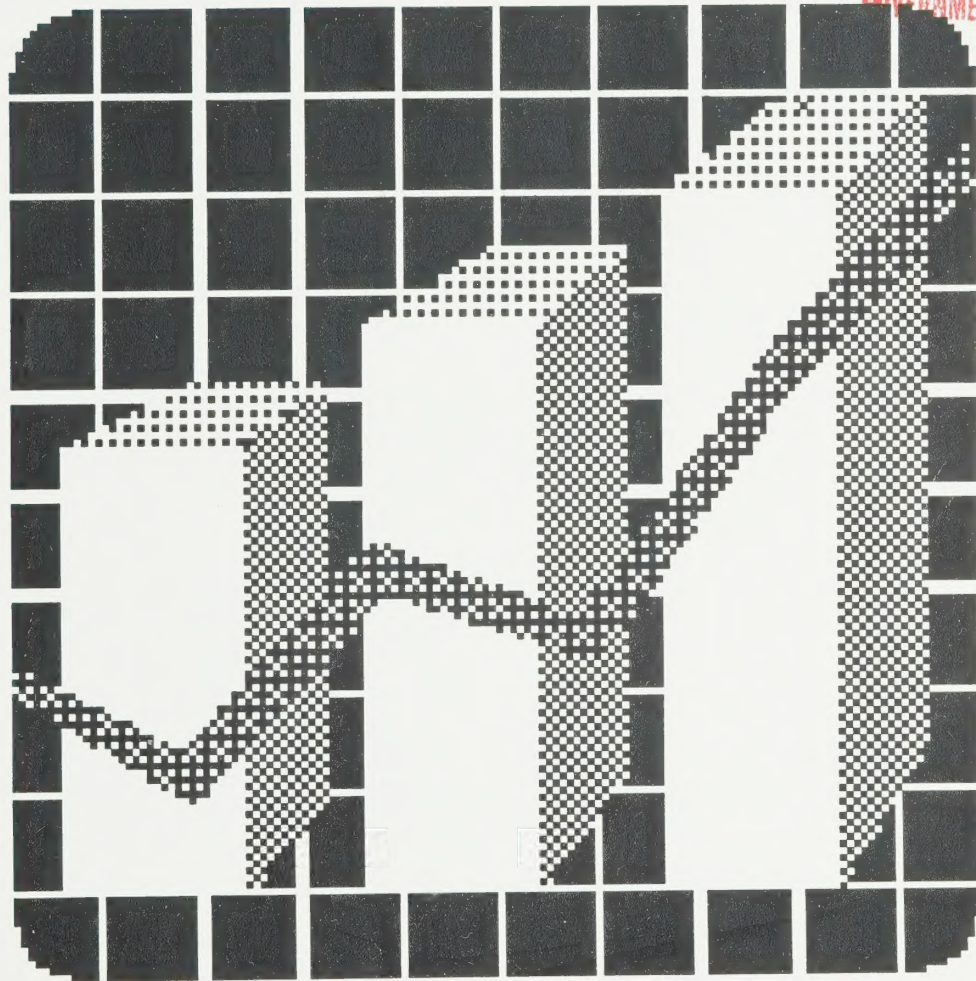
ECONOMIC DEVELOPMENT DEPARTMENT

1994 ANNUAL REPORT


URBAN MUNICIPAL

NOV 2 1995

GOVERNMENT DOCUMENTS



THE REGIONAL MUNICIPALITY OF HAMILTON-WENTWORTH



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Economic Development and Planning Committee

Members

1994

Councillor Don Ross, Chairman

Mayor Ted McMeekin, Vice-Chairman

Councillor Terry Anderson

Mayor Anne Bain

Councillor Don Drury

Councillor William McCulloch

Councillor Frank MacIntyre

Mayor Robert Morrow

Mayor Robert Wade

Regional Chairman Terry Cooke

STATISTICAL OVERVIEW

| ACTIVITY | 1990 | 1991 | 1992 | 1993 | 1994 | INDICATOR |
|--|---------|---------|---------|---------|---------|-------------|
| Building Permits (Millions) ¹ | 753 | 294 | 297 | 352 | 299 | Dollars |
| Business Development Enquiries | 442 | 491 | 286 | 348 | 217 | Firms |
| Business Development Files Completed | 146 | 69 | 63 | 46 | 42 | Firms |
| Business Development Files Dropped | --- | --- | --- | 68 | 22 | Firms |
| Business Expansions and Retentions | 62 | 33 | 27 | 21 | 29 | Firms |
| Canadian Bond Rating ² | AAA | AAA | AAA | AA+ | AA+ | Rating |
| Commercial/Industrial Assessment (Millions) ³ | 507.5 | 518.6 | 504 | 501.7 | 493 | Dollars |
| Economic Impact - Conventions (Millions) | 170 | 214.9 | 141 | 144 | 207 | Dollars |
| Housing Starts ⁴ | 2,381 | 1,515 | 1,793 | 2,055 | 1,961 | Units |
| Housing Completions ⁵ | 2,353 | 764 | 1,685 | 1,841 | 2,332 | Units |
| Industrial Land Sales | 6.6 | 3.4 | 0 | 0 | 27 | Acres |
| Jobs Affected by Dept. Activities | 2,045 | 1,055 | 1,162 | 1,852 | 1,094 | Jobs |
| Jobs Affected by Expansions, Retentions and Relocations | 1,313 | 830 | 723 | 1,273 | 864 | Jobs |
| New Businesses | 94 | 36 | 36 | 13 | 15 | Firms |
| New Business Jobs | 732 | 225 | 439 | 579 | 230 | Jobs |
| New Jobs - jobsOntario Program | --- | --- | --- | 1,461 | 1,775 | Jobs |
| Regional Taxable Assessment (Millions) ⁶ | 1,345.8 | 1,381.7 | 1,391.1 | 1,398.9 | 1,406.5 | Dollars |
| Residential Taxable Assessment (Millions) ⁷ | 838.3 | 863.1 | 887.1 | 897.2 | 913.5 | Dollars |
| Residential Real Estate Volume (Millions) ⁸ | 1,299 | 1,357 | 1,370 | 1,185 | 1,302 | Dollars |
| Total No. of Conventions | 182 | 196 | 215 | 211 | 191 | Conventions |
| Total No. of Delegates | 71,854 | 78,245 | 72,204 | 73,277 | 74,741 | Delegates |
| Total No. of Non-Delegates | 142,063 | 293,288 | 150,000 | 414,185 | 307,151 | Visitors |
| Unemployment Rate Average ⁹ | 6.3 | 9.7 | 11.2 | 11.7 | 7.9 | Percent |
| Value of Land Sales (Thousands) ¹⁰ | 797.4 | 649 | 0 | 0 | 927 | Dollars |

1. Area Municipality Building Departments

2. Canadian Bond Rating Service

3. Regional Department of Finance

4-5. Canadian Mortgage and Housing Corporation

6-7. Regional Department of Finance

8. Metropolitan Hamilton Real Estate Board

9. Hamilton CMA, Statistics Canada

10. Publicly Owned Lands

EXECUTIVE SUMMARY

The mandate of the Business Development Division continued to be the maintenance and expansion of the Region's assessment and employment base. Although 1994 witnessed a significant resurgence of Hamilton-Wentworth's traditional industries (steel and metal fabrication), the Division's principal objective remained to be the diversification of the Region's economy. Specific industry sectors were targeted, in accordance with Sustainable Development guidelines and the recommendations set forth in the Renaissance Report. Business Development staff maintained and expanded activities within the targeted industrial sectors of Environment, Health Care, Food and Beverage, Telecommunications, and Advanced Manufacturing.

The External Market Development program constituted a significant portion of the Division's workplan. In particular, resources were allocated to the development of export markets for local companies with emphasis placed on the U.S. border states. In 1994, the Division ran two successful export related events including a **Trade Marketplace** in which Canadian Trade Commissioners from the four border states were brought in for pre-arranged meetings with over 40 Regional companies, and an **"Exporting to the U.S."** seminar which had eight guest speakers and over fifty local companies in attendance. The Division's international marketing efforts, which concentrated on strategic alliances and investment opportunities, were limited to Mexico (Monterrey) and the Pacific Rim (Hong Kong, Taiwan and Japan).

The "Satellite Office" program continued throughout 1994, with a Development Officer assigned to each area municipality. The success of this initiative continues to be witnessed in the increased awareness and activity of the Department in the respective area municipalities. Local market development is the fundamental component of the Economic Development function, a statement supported by the 650 company visitations throughout the year. In addition, Business Development recorded 42 files completed in 1994 resulting in the following local employment statistics: 230 new jobs, 568 retained jobs, and 167 jobs expanded.

Business Development staff were directly involved in the following major projects in the Hamilton-Wentworth Region:

- Splendid Cathay Development - former Hamilton CNR Station to be converted into an Asian/Pacific Rim retail and multi-cultural centre.
- Safari Resorts International - a major hotel and recreation complex designed to operate year round and compliment the existing African Lion Safari theme park.
- Philip Environmental Group (PUMC) - a cooperative plan to capitalize on opportunities in the water and sewage treatment management field evolving from the Philip Environmental and Region of Hamilton-Wentworth agreement. Funds have been allocated in the 1995 budget to monitor and deliver the PUMC/Region economic development initiatives.
- Food and Beverage Business Park - a Region/private sector joint venture for the development of an industrial business park dedicated solely to Food and Beverage related companies.
- Canuck 750 - a world class auto racing development in Flamborough, similar to Indianapolis Motor Speedway.
- Wescam - the Region and Wescam have agreed to undertake a cooperative marketing plan to help foster telecommunications sector development. The plan stems from the Techpark land sale agreement between the Region and Wescam and ensures worldwide exposure for telecommunications opportunities in the Region.

LOOKING AHEAD 1995 FORECAST

In the next year, the economic growth and "well being" of the private sector should remain constant. However, virtually every level of government in Canada will be forced into making significant cuts in expenditures and programs. In 1995, the consequences of massive debts and heavy government spending will begin to be realized in a number of areas.

In October 1994, Finance Minister Paul Martin forewarned Canadians of sizeable reductions in federal spending and the corresponding effects on Canada's social programs and public service levels. In order to achieve the government's deficit reduction targets, Minister Martin emphasized that there would be significant decreases in transfer payments to the provinces. The magnitude of these reductions will be announced in the Federal government's February budget.

In Ontario, the timing of Ottawa's fiscal restraint couldn't be worse. Not only will Queen's Park have to deal with its own debt crisis but now they can expect reduced support from Ottawa. This should result in the "toughest" budget this province has ever seen. Immediate impacts in health care, social services, education and the level of provincial transfer payments to municipalities are anticipated.

In 1995, expect continued increases in interest rates due to high levels of provincial and federal debt. Given the U.S. Federal Reserve Board's policy of controlling inflation by increasing short-term interest rates, the Bank of Canada will have no alternative but to "mirror" any U.S. actions to maintain the current spread in rates. Watch for interest rates in 1995 to climb noticeably, perhaps as much as a two to three point increase in prime by year end. This should slow economic growth to below 3% and curtail the most recent gains in consumer spending, especially the "big ticket" items like automobiles, homes and appliances.

The Canadian dollar should remain in the \$0.70 to \$0.73 U.S. range but could potentially break through the seventy cent barrier depending on the market's perception of both the federal and provincial governments debt reduction plans. In addition, the dollar may fall dramatically (possibly in the \$0.65 US range) depending on the result of the anticipated Quebec referendum on separation. However, the value of the Canadian dollar should continue to benefit the manufacturing sector (ie. Toyota expansion - Cambridge) and in particular, those companies that export a majority of their product and/or services. Sales in the retail and service sectors will remain unchanged or be marginally lower as compared to 1993; this being primarily due to lower automobile sales, declining consumer confidence, increased competition from U.S. corporations in Ontario, and the effects of government "belt tightening".

For Hamilton-Wentworth, 1995 could be best described as a "mixed bag". Ontario's economic recovery has once again been led by the automotive sector. In fact, since 1991 motor vehicle sales of the "Big Three" automakers have rebounded to record numbers capturing a rising share of the North American market. This trend translates into a continued demand for steel, which bodes well for Dofasco, Stelco and other area steel companies. Manufacturing (Hamilton-Wentworth's strongest sector) in Ontario is projected to experience a growth rate of 4% to 6% over the next year. In the Region, this should mean a marginal reduction of the unemployment rate (which is already below that of Metro Toronto and the provincial average)--look for an unemployment rate in the 7.5% to 8.0% range for 1995. Employment gains are stated as only marginal because of recent trends in the manufacturing sector. They indicate that increased market demand for goods and services are being primarily satisfied by local companies investing in technology and equipment.

The "bad" news for the Region will be attributable to the federal and provincial debt crisis. With the public sector comprising a significant proportion of the Region's total employed labour force, the impact of reductions in transfer payments and government expenditures will be pronounced. Overall, the conservative projection is a 2% to 4% decrease in public sector employment throughout the province with corresponding results in Greater Hamilton.

In summary, the "jobless recovery" will continue to prevail in 1995 but expect healthy sales growth in the private sector--led by manufacturing, the environmental sector, small and medium entrepreneurial enterprises, and the food and beverage industry.

BUSINESS DEVELOPMENT

ACTIVITY

The volume of departmental activity is measured and monitored on a regular basis through lead tracking. Although not all departmental activities are quantifiable, the following table displays the volume of activity in the Business Development Division. Each staff member records daily and monthly activities from which annual totals are compiled.

Summary of Lead Generation

This table generally reflects the volume of enquiries and day-to-day activities of Business Development staff:

| Source | Local | External | Total |
|-------------|-------|----------|-------|
| Telephone | 5,332 | 1,973 | 7,305 |
| Letter | 1,199 | 419 | 1,618 |
| Referral | 135 | 38 | 173 |
| Meeting | 382 | 108 | 490 |
| Visitations | 650 | N/A* | 650 |

Supporting Initiatives

The following table endeavours to record the additional duties and responsibilities of Business Development staff and primarily involves actions that require planning and allocation of funds from the annual operating budget.

| Promotional Activity | Local | External | Total |
|------------------------------------|-----------|-----------|------------|
| Conferences/Seminars | 7 | 7 | 14 |
| Direct Mailing | 11 | 1 | 12 |
| Public Relations/ Presentations | 14 | 6 | 20 |
| Hosting Foreign Delegations | 4 | 6 | 10 |
| Receptions | 22 | 5 | 27 |
| Trade Missions | N/A* | 14 | 14 |
| Trade Shows | 5 | 7 | 12 |
| Total | 63 | 46 | 109 |

* "N/A" denotes not applicable.

SUPPORT MATERIAL

Annual Report

A detailed report of the Department's 1993 initiatives was produced in early 1994. The document is used to advise potential investors of the Region's overall plans for economic development as well as provide a demographic overview and trend analysis of economic indicators.

Audio Visual Production

The Region's video, "The Natural Choice" was awarded Best Video at the 1994 Economic Developers Association of Canada (EDAC) marketing award competition.

Business Development Services Brochure

This brochure was reprinted with multilingual translated editions.

Business Proposals

An inventory of business and investment opportunities for use by entrepreneurs and local businesses was maintained via our "Opportunities" publication.

Corporate Brochure

The "Initiative" brochure was distributed on a regular basis to provide interested parties with a visual image of our community as well as deliver testimonials as to the receptive business community.

Executive Summary

This publication was updated and reprinted.

Newsletter

Skyline was amended in 1994 to reflect a theme for each issue. Further, Skyline stories focused more upon specific business interests and attempted to convey useful information which local enterprises could capitalize upon. Skyline was awarded "Best Newsletter" at the 1994 EDAC Marketing Awards competition.

Print Placements (local)

- Better Business Bureau (Annual Directory)
- Flamborough Chamber of Commerce (Annual Directory)
- Hamilton Business Report (six placements)
- Hamilton and District Chamber of Commerce (Annual Directory and Panorama)
- Hamilton and District Homebuilders Association Directory (Annual Directory)
- McMaster Times (two placements)
- Stoney Creek Chamber of Commerce (Annual Directory and Newsletter)
- Transit Shelters (focusing on Downtown events and activities)

Print Placements (external)

National

- Canadian Business
- Profit Magazine and Profit Home Business

International

- Area Development
- Society of Industrial and Office Realtors

BUSINESS DEVELOPMENT

Promotional Items

Items emblazoned with the Regional logo continue to reinforce image of the Region through distribution to clients and prominent visitors.

Radio

Radio commercials were targeted at local businesses to advise of Department services and increase awareness. A weekly show was also introduced using testimonials to promote the Department's abilities to serve and address local business.

DEPARTMENTAL SUPPORT MATERIAL

Presented below are the statistics representing the distribution levels of departmental brochures and other support materials.

| Publications | # Produced | Year-End Inventory | # Disseminated |
|--------------------------------------|------------|--------------------|----------------|
| 1993 Annual Report | 200 | 20 | 180 |
| Community Profile | 300 | 10 | 290 |
| Business Services Brochure: | | | |
| English | 1,000 | 50 | 950 |
| Chinese | 1,000 | 500 | 500 |
| German | 500 | 400 | 100 |
| Spanish | 600 | 300 | 300 |
| Initiative (Corporate Lure Brochure) | 440 | 20 | 420 |
| Executive Summary | 1,000 | 90 | 910 |
| Environmental Sector Manual | 100 | 100 | 0 |
| Food and Beverage Sector Manual | 100 | 42 | 58 |
| ECA Kits | 200 | 0 | 200 |
| Export Flyer | 150 | 0 | 150 |
| Media Kits | 700 | 500 | 200 |
| Opportunities | 1,000 | 30 | 970 |
| Skyline (4 quarterly issues) | 10,000 | 60 | 9,940 |

BUSINESS DEVELOPMENT

DEPARTMENTAL RESULTS

Business Development staff document and record any action taken when working with a Regionally based or external company by means of files called "contact reports." These files chronologically record any department involvement that may assist the company in achieving its specific objectives (ie. expansion, export, relocation, etc.).

| Contact Reports | Local Lead | External Lead | Total |
|-----------------|------------|---------------|-------|
| Files Opened | 154 | 63 | 217 |
| Files Completed | 27 | 15 | 42 |
| Files Dropped | 13 | 9 | 22 |

Source: Economic Development Department, Contact Reports

Volume of Activity - Five Year Summary

This table illustrates the number of files opened per annum and those files that were completed. In 1994, a new system was instituted in which staff opened a file only if a tangible result was probable thereby reducing clerical work.

| Indicator | 1990 | 1991 | 1992 | 1993 | 1994 | 5 Year Total |
|-----------------|------|------|------|------|------|--------------|
| Files Opened | 442 | 491 | 286 | 348 | 217 | 1,784 |
| Files Completed | 146 | 71 | 63 | 45 | 42 | 367 |

Source: Economic Development Department, Contact Reports

Employment Activity

The following table represents any new, retained or expanded employment that occurs in the Region as a result of department efforts. The employment numbers are derived from files completed (contact reports) that may have been opened in 1994 or previous years.

| Indicator | Local Lead | External Lead | Total |
|---------------------|------------|---------------|-------|
| Jobs Created | 140 | 90 | 230 |
| Jobs Retained | 568 | N/A* | 568 |
| Jobs Expanded | 167 | N/A* | 167 |
| Total Jobs Affected | 875 | 90 | 969 |

* N/A denotes not applicable

SPECIAL PROJECTS

- ***African Lion Safari***

The multi million dollar development proposed to augment the existing African Lion Safari has continued to gain momentum and support. In the fall of 1994, Safari Resorts International submitted their application of amending the Official Plans and Zoning By-Laws of the Region and Town of Flamborough. Feasibility studies undertaken by Resort consultants have verified the proposal, and prompted efforts to secure investment capital from local and offshore sources to facilitate the project.

- ***Airport Marketing***

Staff marketed Aeropark, Hamilton Airport lands and services using the Marketing Implementation Plan and Hamilton Airport Compendium to aviation companies both locally and internationally. A Tenant's Toast was held to acknowledge the important contribution existing companies at the Airport make to our Region's economic well-being.

- ***Business Opportunities in the Environment Symposium***

1994 was a rebuilding process for the Business Opportunities in the Environment symposium. Due to a lack of funding from senior levels of government, the event did not take place in 1994. However, the show will be revitalized in 1995 as the Ontario Centre for Environmental Technology Advancement (OCETA) has agreed to establish an annual environmental event in conjunction with the Department.

- ***Business Advisory Centre***

Business Development staff have worked with BAC representatives on a number of common projects such as GHTEC, Jobs Ontario Community Action (Province of Ontario), business consultation and provision of services to the tenants of GHTEC.

- ***Canuck 750***

The proponents of the Canuck are continuing discussions to raise the necessary capital to commence construction of the multipurpose sport and entertainment facility.

- ***Downtown Revitalization***

Economic Development staff have increased efforts to the revitalizing of Greater Hamilton's urban centre. In addition to participating with the Mayor of Hamilton's Task Force, staff undertook several initiatives to assist in heightening awareness and preparing for a greater focus in 1995. Resources were re-allocated within the Department for multi-media campaigns directed at the downtown area, in addition to promoting specific events (Toyota Pro Figure Skating Championships) to increase the range of activities and attract more people downtown. A revised strategy with appropriate funding is proposed for 1995 for the consideration of Regional Council during the budget deliberation process.

- ***Environmental Commitment Awards (ECA)***

The Fourth Annual Environmental Commitment Awards are being touted as the most successful ever. There were more participants in the 1994 program than in any of the previous three years. The awards recognize local firms that have introduced or applied an environmentally friendly product/service. The 1994 awards were presented at Regional Council on November 1, 1994.

- ***Greater Hamilton Technology Enterprise Centre (GHTEC)***

Early in 1994, the incubator was officially opened and the first tenants leased space. Occupancy of the building grew rapidly with new and expanding high technology businesses taking space.

- ***Ontario Centre for Environmental Technology Advancement (OCETA)***

Staff developed a formal proposal in conjunction with the Business Advisory Centre to locate an office node of the Ontario Centre for Environmental Technology Advancement at the Greater Hamilton Technology Enterprise Centre. OCETA staff has been assigned to the Hamilton node and will commence formal operation in January 1995.

BUSINESS DEVELOPMENT

- **Office of Health Economic Development**

Approved by Regional Council and established in the fourth quarter of 1994, the office of Health Economic Development is staffed by a private economic development consultant--Mr. Mark Mindorf of Apractical Inc. The office's mandate is to develop programs and policies that will: 1) improve access to medical product manufacturing opportunities, 2) represent the Region of Hamilton-Wentworth's interests as a Health Care Economic Region, and 3) to support the development of Health Care enterprises in the Region. This office will work closely with the sector specialist of the Business Development division.

- **Philip Utilities Management Corporation (PUMC)**

Economic Development staff assisted in the negotiations with Philip Environmental's new Philip Utility Management Corporation to operate the Region's wastewater and water treatment facilities. The privatization package focused extensively on economic development benefits which should result in hundreds of jobs and millions of dollars in capital investment. PUMC has guaranteed at least one hundred jobs to be created over the next five years. An ongoing relationship has been forged which will enable both the Region and PUMC to capitalize upon emerging global opportunities in the wastewater and water treatment field.

- **Renaissance Project**

Approved by Regional Council in the fall of 1994 and incorporated into Economic Development's 1995 Marketing Plans, the Renaissance Report is an action plan to revitalize the economy of the Hamilton-Wentworth Region. The report involved considerable community input and produced a strategic plan which complemented initiatives already in place by the Department. The report identified specific industry sectors and recommended actions required to increase the sector's development. Business Development staff currently designated to these sectors are endeavouring to initiate as many recommendations as possible given current Department resources. Funding for Renaissance initiatives will be addressed during the 1995 budget deliberation process.

- **Sustainable Development Task Force**

Developed as a frame work to guide the Region through the challenge of sustainable development was Vision 2020, the Region's own plan. Staff continued to assist and advise the Task Force on their initiatives to implement the Vision.

- **tranSKILLS**

A community based organization that develops and implements innovative skill building programs and processes. The Region currently funds the organization at a level of \$47,000.00 per annum. Business Development will be establishing a closer working relationship with tranSKILLS especially in regards to strategic planning, labour market research and assisting staff with training issues related to company visitations.

- **Splendid Cathay**

Staff worked closely with the principals of Splendid Cathay Corporation to prepare all of the necessary documents for submission to the Provincial and Federal officials under the Immigrant Investor Program for the development of a Pacific retail and multi-cultural centre on CN lands at Murray and James Streets. The Offering Memorandum was officially submitted to the Provincial Ministry of Economic Development and Trade in December, 1994.

- **Wescam**

The retention of Wescam, a world leader in the field of optical equipment and aerial video reconnaissance, was a major achievement for the Region. An innovative financial package and creative land development agreement have helped convince Wescam that their future will be best served within Hamilton-Wentworth. A long term relationship has also been established to co-operatively market the Region in offshore markets through Wescam's foreign operations. In addition to retaining 45 employees, and 10,000 square feet of assessment, Wescam's new facility in Techpark will witness the addition of another 50 jobs and a total of 38,000 square feet of building.

Committees

Staff are often called upon to sit on various local committees.

Those committees in 1994 include:

Barton Street Revitalization

Business Development Seminar Committee

Community Economic Development Venture Capital

Conference on Disaster Management

Downtown Task Force

Flamborough Chamber of Commerce

Flamborough Economic Development Task Force

Gore Park Review Committee

Hamilton Business Development Seminar

Hamilton & District Chamber of Commerce Business Development Committee

Hamilton & District Chamber of Commerce International Trade Committee

Hamilton Official Plan Amendment Committee

Harbourfront Development

Human Resource Advisory Committee

Liberal/Conservative Round Table

Local Environmental Business Network

Manufacturers Network

McMaster Intellectual Property

National and Ontario Round Table

Social Assistance Committee

Stoney Creek Chamber of Commerce

Sustainable Community Day

Task Force in Job Creation

BUSINESS DEVELOPMENT

LOCAL MARKET ACTIVITIES

Daily operations of the Business Development Division encompass a wide range of activities and responsibilities. Staff organize and host numerous business related events in addition to representing the Region and local companies at business functions. These types of activities are one of the primary vehicles for promoting the Region, major developments in the community and the business sector. The following is a summary of these activities:

Receptions Hosted

- April - Tenant's Toast (Hamilton Airport)
- April - Realtors' Breakfast (Hamilton)
- June - Business Appreciation (Ancaster)
- June - Trade Commissioners (Hamilton)
- November - Environment Commitment Awards

Receptions Attended

- February - McMaster Life Sciences Luncheon (Hamilton)
- March - Hamilton and District Chamber of Commerce Annual Dinner (Hamilton)
- April - Cootes Paradise Ground Breaking (Hamilton)
- May - National Round Table on the Environment and Economy (Hamilton)
- May - Outstanding Business Achievement Awards (Hamilton)
- May - Redlands Quarry (Hamilton)
- June - Honourable David Crombie Breakfast (Hamilton)
- July - Harbour Tour (Hamilton)
- July - GHTEC - Sheila Copps Reception (Great Lakes Pollution Prevention Centre, Hamilton)
- August - Thermotech (Hamilton)
- September - Comtec Opening (Flamborough)
- September - State of the Region Address (Hamilton)
- October - Transkills: Challenges of Tomorrow (Hamilton)
- November - Careers for a Better World (Hamilton)
- November - G-7 Environmental Announcement (Hamilton)
- December - Hamilton and District Chamber of Commerce President's Panel (Hamilton)
- December - Wescam (Hamilton)

Staff from Business Development also participated in attending and presenting, along with co-sponsors, a variety of local seminars and conferences which focus on the key issues influencing our local economy.

Seminars/Conferences Hosted

- June - Trade Commissioners Marketplace (Hamilton)
- October - Business Development Seminar
- November - "Exporting to the United States" (Stoney Creek)

Seminars/Conferences Attended

- March - Mohawk College Internet Presentation (Hamilton)
- February - Transkills: Doing Business in Mexico (Hamilton)
- April - Festivals Ontario (Hamilton)
- May - World Conference Disaster Management (Hamilton)
- November - Royal Bank 1995 Economic Forecast

BUSINESS DEVELOPMENT

Presentations

Staff made a number of presentations to local organizations and companies describing the function and services provided by the Economic Development Department, and providing topical insight on major issues affecting the global economy.

- January - BAC: Entrepreneurial Skills Program (Hamilton)
- January - Executive Committee (Stoney Creek)
- January - McMaster Careers Workshop (Hamilton)
- February - Central Beasley Neighbourhood Plan Committee (Hamilton)
- February - Local CEIC (Hamilton)
- April - CN Station Citizens' Advisory Group (Hamilton)
- April - Executive Committee (Stoney Creek)
- July - Executive Committee (Stoney Creek)
- July - Infrastructure Announcement (Hamilton)
- September - Transkills: Environmental Transition Group (Hamilton)
- October - Transkills: Advanced Manufacturing Group (Hamilton)
- November - Ancaster Chamber of Commerce (Ancaster)
- November - Dundas Infrastructure Announcement (Dundas)
- December - Local CEIC (Hamilton)

Trade Shows Attended

Staff participated in attending the following local trade shows:

- April - APMA (Automotive Parts Manufacturers' Association) (Hamilton)
- May - Southwestern Ontario Builders' Symposium (Hamilton)
- June - Sustainable Community Day (Hamilton)
- September - Recycling Council of Ontario (Hamilton)
- October - Business Development Seminar (Hamilton)

Direct Mailing

Staff initiated 20 local direct mail campaigns, including:

- 8,000 - Industrial Inventory Data Base survey
- 2,000 - *Skyline* (produced and mailed quarterly)
- 180 - Canadian Consulate Hi-Tech Partnering
- 180 - Promotion of Exporting Seminar
- 180 - United States Trade Commissioners Marketplace
- 175 - *Opportunities* (three editions produced and mailed in 1994)
- 58 - Awareness building of Economic Development to Ancaster/Dundas businesses
- 40 - Awareness building and request to participate in the Food and Beverage Sector Manual
- 30 - Business Development Seminar Brochures
- 20 - Advanced Materials Manual
- 18 - Health Sector Profile

Hosting Foreign Delegations

The Economic Development Department organizes and hosts inbound investors to market the community's amenities.

- August - Chinese Delegation - Luke Chan (Hamilton)
- August - Taiwanese Delegation (Hamilton)
- September - Chinese (Anhui) Reception (Hamilton)
- September - Taiwanese Delegation - Mr. Sun (Hamilton)

EXTERNAL MARKET ACTIVITIES

Business Development is mandated with the responsibility to market the Region as a place to invest and a destination for plant location. Additionally, the department devotes significant resources to develop strategic alliances (joint ventures, technology transfers, licensing agreements, etc.) and identify new export markets for area companies. In 1994, Business Development focused the external marketing efforts on specific geographic markets (northern USA, Mexico and Pacific Rim) and industry sectors (Environment, Telecommunications, Medical, Food and Beverage). A synopsis of these activities is detailed below:

Receptions Attended

- February - Japanese Reception - Toronto
- April - Pacific Rim Countries (Hong Kong, Philippines, Taiwan)
- May - Baoding, China Seminar/Reception - Toronto
- June - Hong Kong - Toronto
- November - United States Consulate - Toronto

Seminars Attended

Staff also attended the following seminars to keep informed of emerging global trends, prevailing economic conditions, new joint venture agreements and strategic alliances.

- February - Vietnam Seminar - Toronto
- April - Multi-State Trade Day - London
- June - China Seminar - Toronto
- June - Philippines Seminar - Toronto
- September - Economic Developers Association of Canada - Fredericton, N.B.
- October - Hi-Tech Partnering Seminar - Niagara Falls
- October - Japanese Seminar

Presentations

- July - Industry Canada International Trade Centre - Toronto
- July - Upstate New York/New York State Economic Development - Toronto
- August - Buffalo Chamber of Commerce - Buffalo
- August - Buffalo Canadian Consulate General - Buffalo
- August - Economic Development City of Buffalo - Buffalo
- August - Greater Buffalo Partnership - Buffalo

Trade Shows Attended

Staff attended and/or exhibited at the following trade shows for the purpose of marketing the Region as a high profile and affordable location for business investment prospects.

- March - CEBIT Trade Fair - Germany
- May - Biotechnology - Toronto
- May - Pro-Eco 94 (Environment) - Mexico
- May - Super Comm - New Orleans
- October - World Trade '94 - Toronto
- November - Great Lakes Industrial Exhibitions - Cleveland
- December - ICI Metro Toronto Realty Show - Toronto

BUSINESS DEVELOPMENT

Trade Missions

- April - Philippines
- April - United Kingdom
- April - Taiwan
- May - Monterrey, Mexico
- May - San Antonio, Texas
- May - New Orleans, Louisiana
- August - Detroit, Michigan
- September - Cleveland and Toledo, Ohio
- September - Erie and Pittsburgh, Pennsylvania
- October - Rochester, New York
- November - New York, New York
- November - Cleveland, Ohio
- November - Hong Kong
- November - Japan

Direct Mailing

- Awareness building of Department and Hamilton Airport to international aviation companies; approximately 200.

Hosting Foreign Delegations

The Economic Development Department organizes and hosts inbound investors to market the community's amenities. In 1994, those delegations included:

- May - El Paso, Texas
- July - Japan
- November - Russia
- December - China
- December - Korea
- December - Latvia

REGIONAL BUSINESS PARK SALES AND DEVELOPMENT

Staff undertook a variety of marketing tactics in 1994 to induce land sales. A high vacancy rate for existing industrial properties and the high cost of acquiring new facilities has diminished the demand for new industrial space. In 1995 staff will endeavour to consummate land sales through a variety of initiatives.

Aeropark - Greater Hamilton Airport Business Park (Glanbrook)

Servicing of Aeropark was completed in 1994. Although no sales are expected to be finalized prior to the release of a new Airport development action plan, staff are actively marketing the lands. Fifty acres are available for aviation related businesses.

Ancaster Business Park

No sales in 1994. The entrance way project was delayed due to market conditions but is expected to commence construction in the spring of 1995. Signage at the main intersection has been completed .

Dundas Business Park

The Official Plan and Zoning Amendment application have been received by Council. Finalization of the Zoning By-law is expected by the spring of 1995. The consultant's report has been well received and addressed a multitude of local interest group concerns.

Food and Beverage Business Park (FBBP)

Revised Provincial regulations pertaining to storm water management practices has delayed the project. Staff are working with the Regional Roads Department to address concerns and hope to have a revised system approved early in the new year. Draft marketing material has been completed to enable a proactive campaign to commence immediately upon approval of the park.

Hamilton Mountain Business Park #2

Sales were negotiated with the City of Hamilton to accommodate the Hamilton Society for the Prevention of Cruelty to Animals (HSPCA) and the Firefighters Drum Corp for property along Dartnall Road.

North Glanbrook Business Park

The Region's holdings in this area (52 acres) are not expected to be developed prior to 1996.

TECHPARK - Greater Hamilton Technology Business Park

Servicing of the park commenced in the fall of 1994. Over the course of the last two years, sale of a four acre parcel to Wescam has been pursued. This innovative transaction has enabled the retention of the firm, and accommodated a private sector driven project which should induce further activity. Wescam will join the Greater Hamilton Technology and Enterprise Centre (GHTEC) as key tenants in Techpark.

EXECUTIVE SUMMARY

The main thrust of the convention division of the Economic Development Department is to attract meetings, conventions and major events to Greater Hamilton, resulting in significant external economic benefit to the Region.

Final convention/events statistics for 1994 show an estimated economic impact of \$207 million dollars. Approximately 191 conventions/events were held in Greater Hamilton in 1994 attracting 74,741 delegates and over 307,151 spectators. Major contributors to these figures include the International Children's Games, Canadian Christian Festival, the Labatts Slo-Pitch Championships, the World Basketball Championship, the World Gymnastic Challenge and Toyota Professional Figure Skating Championships.

Client response has indicated that the impressive range of services offered to convention organizers by Convention Services was key in selecting Greater Hamilton as their destination.

Economic Outlook

The convention industry in Greater Hamilton showed a marked improvement in 1994 against the previous year as a result of several factors: continued co-operative marketing by the hospitality partners, specific target marketing and incentive programs. Part of this year's success with confirmed conventions can be attributed to higher quality bids and bid presentations made to the prospective clients. Additionally, the implementation of sales reports has resulted in better communication between the hospitality partners and provides an effective measuring tool of the Department's marketing programs.

Looking ahead, 1995 should see an increase in sporting events. Trends indicate that Federal/Provincial sporting events for adult recreational athletes will increase in numbers and participation.

SALES and MARKETING INITIATIVES

The Conventions Division in 1994 initiated a marketing plan which targeted three major sectors in this industry:

- a) local awareness
- b) repeat business
- c) new business

Local Awareness

The objective of this program is to approach and recruit local members involved in Federal/Provincial associations, fraternal associations and sporting groups. A public relations/media campaign was to have been implemented in 1994 but due to budgetary constraints was put on hold until 1995. To increase awareness and expose current developments in the local hospitality industry and facilities, host receptions were held in conjunction with the hospitality partners for potential clients.

Repeat Business

The objective is to ensure that past conventions/events held in Greater Hamilton return. Direct mail campaigns and routine follow up was conducted and completed in the first quarter of 1994 with familiarization tours and receptions held at several events utilizing the HECFI facilities throughout the year.

New Business

The objective of this program is to approach prospective clients who have not utilized convention facilities in Greater Hamilton in the past and encourage them to secure space in the Region.

CONVENTIONS

Incentive Programs

The "Meet Free" programme was developed and utilized by three major conventions and events in 1994:

- The New Democratic Party Conference
- 1994 Labatts Slo-Pitch Championships
- The World Gymnastic Challenge

As well, future conventions were confirmed as a result of this program;

- Ontario Non-profit Housing Association (1995)
- The International Association of Arson Investigators Annual General Meeting (1997)
- Labatts Slo-Pitch Championships (1995 and 1996)

The Special Events Revolving Fund

The Special Events Revolving Fund was developed in 1994, and utilized by the Canadian Christian Festival. The Fund was reduced throughout the year due to budget constraints and should be reinstated in 1995, subject to Regional Council approval. Advertisements in major trade magazines were placed in conjunction with HECFI, to advertise on alternate placements to achieve maximum returns and exposure.

Familiarization tours and receptions were held using HECFI facilities and other venues in the Region. Continued presence in organizations such as Canadian Society of Association Executives, Meeting Planners International and Religious Conference Management Association through membership and marketplace participation was achieved to provide new contacts. In 1994 Greater Hamilton secured the 1997 Canadian Society of Association Executives Annual Conference, the premier conference in Canada for association executives and meeting planners.

Professional Development

Staff attended the following professional development/sales conventions which provided insight on many topical issues and invaluable opportunities to network with colleagues within the hospitality industry:

Association of Conventions Operations Management
Canadian Association of Convention and Visitor Bureaus
Canadian Society of Association Executives Annual Conference
CSAE/MPI Ottawa Tête à Tête Tradeshow
International Association of Convention and Visitor Bureaux Education Seminars
Religious Conference Management Association Trade Show

1994 Convention/Event Attendance Figures

| Indicator | 1991 | 1992 | 1993 | 1994 |
|------------------------|-------------|-------------|-------------|-------------|
| Number of Conventions | 196 | 215 | 211 | 191 |
| Number of Delegates | 78,245 | 72,204 | 73,277 | 74,741 |
| Number of Spectators * | 293,288 | 150,000 | 416,185 | 307,151 |
| Economic Impact | 214,950,680 | 173,019,840 | 230,601,770 | 207,000,000 |

* Spectators refer to delegates/attendees not requiring overnight accommodation.

N.B. Statistics reflect only those conventions/events initiated and/or serviced by or directly reported to Economic Development.

CONVENTIONS

1994 Convention/Event Bid Submission Figures

| Indicator | 1991 | 1992 | 1993 | 1994 |
|--------------------------------|------|------|------|------|
| Bids Submitted | 59 | 57 | 73 | 58 |
| Bids Confirmed | 21 | 22 | 27 | 30 |
| Bids Lost | 09 | 12 | 16 | 14 |
| Bids Outstanding | 13 | 18 | 30 | 14 |
| Previous Year's Bids Confirmed | N/A | N/A | N/A | 4 |
| Previous Year's Bids Lost | N/A | N/A | N/A | 16 |
| Previous Year's Bids Lost | N/A | N/A | N/A | 7 |

CONVENTION SERVICING

Convention services initiatives strive to provide convention/event planners with superior servicing assistance, thus encouraging repeat bookings and favourable reports. Major areas where staff strive to provide services are: convention attendance building, delegate housing, registration assistance, tourist information, spousal program, transportation assistance, tours, theme nights and grant application requests.

Housing

Tourism and Convention services provided housing services to the American Society of Foundrymen. Approximately 2000 delegates were housed at area hotels and motels.

Computer registration program

An in-house computer registration program was provided to 10 conventions/events in 1994 (refer to the Supplemental Report).

Convention/Event Attendance Building

Meeting/event planners realize the significance of marketing future convention/event destinations/attractions/facilities to prospective attendees, thereby increasing attendance at their conventions/events. Staff attended 6 conventions/events in 1994 all of which will hold their convention/event in Greater Hamilton. In addition approximately 11 associations were provided with promotional material, displays and audio/visual to boost attendance at their 1995 convention in Greater Hamilton (refer to the Supplemental Report).

Host Committees

Staff are also involved in Host Committees for Conventions/Events (refer to Supplemental Report).

TOURISM EXECUTIVE SUMMARY

The goal of the Tourism Division is to increase the number of visitors and duration of stay to Greater Hamilton, thereby generating wealth and spin-off economic benefits for the community.

Overall Economic Outlook

While optimism is the word, 1994 did send some mixed signals about the economic recovery. Both housing and automobile sales, key indicators of growth, experienced volatility as did interest rates. Employment started to expand in the 3rd quarter of 1994, a full four years after the recession began. Since December 1993, the country has seen a gain of more than 288,000 jobs, an excellent increase which will have positive spending implications. The major area of employment reduction is anticipated in the government sector, with layoffs and hiring freezes continuing into 1995.

1995 will present the brightest prospects for tourism in the past five years.

- Strong consumer and business confidence will position the industry for gains in consumer spending--especially discretionary items such as travel and vacations.
- Increased interest rates will slow the U.S. economy, but demand for Canadian exports will remain strong.
- Favourable exchange rates will continue to make Canada a tourism value-for-money destination.
- Fiscal restraints on governments and the unprecedented challenges to national unity will continue to create financial instability. These two factors could reverse both the positive forecast and continued low interest rates.
- Overall GDP growth for 95/96 will be about 3.5 per cent. This illustrates a sound base from which tourism will continue to expand.

Travel and Tourism Outlook

Spending on accommodation and food grew by more than 3 percent in 1994. If 1995 sees a similar increase, this will present a continuous five year growth after the very serious declines of 1991. Growth in volumes will be about 2 per cent in 1995 and possibly 3 per cent in 1996.

The impact of the Canadian dollar was positive on tourism. Its low level attracted more out of country visitors and discouraged Canadians from travelling outside the country. The growth in travel receipts for 1994 was 14 per cent and will rise again by 5 to 8 per cent for 1995 and 1996. These signs suggest that inbound travel to Canada will moderately but steadily increase.

Alternatively, the low Canadian currency will discourage Canadians' ability to travel abroad. In 1994 there was no growth in travel spending abroad by Canadians and the Conference Board of Canada predicts nominal growth if any, over the next two years.

The U.S. economy will be slowing in 1995. Even so, exporters of automobiles and lumber will continue to do well. Canadian currency should continue to trade around 70 to 75 U.S. cents, and this will support export strength in goods and tourism.

TOURISM

Results - Hamilton-Wentworth

Overall attraction attendance was up by 1%. During the summer months (June, July, August and September) attendance increased by 5.5%

Motorcoach travel to Hamilton has continued to improve by more than 38%. Staff tracked fifteen markets for incoming tours. The top four markets were Ontario, New York, Pennsylvania and Ohio. The most significant increases came from markets outside the traditional areas tracked with an increase of 210%. Staff will analyze these emerging markets for inclusion in further marketing efforts.

There are signs that the number of tour buses coming to Greater Hamilton in 1994 are greater than calculated. Unfortunately some festivals and attractions cannot supply the department with statistics for 1994 thus making these statistics incomplete.

Tourist Centres recorded a 93% increase in walk-in traffic and slight decrease in mail inquiries. The decline of written requests for information is consistent with the past few years. It is attributable to electronic technology.

The Tourism and Convention 1-800 number recorded notable increases in Canadian calls and decreases in U.S.A. based calls. Marketing efforts in 1994 concentrated primarily on Southern Ontario with less emphasize on the U.S.A. market, reflecting a change in marketing strategy. Since the Celebrate Marketing program took effect in 1992, Canadian calls increased by 67% and US calls by 262%.

Attendance and Enquiry Summary

| Indicator | 1993 * | 1994 | +/- % |
|-----------------------------|---------|-----------|---------|
| Attraction Attendance | 986,333 | 1,028,450 | +1% |
| Festival Attendance | 499,300 | 609,094 | + 37% |
| Visitors to Tourism Centres | 18,695 | 36,119 | + 93% |
| Origins of Visitors: | | | |
| Canada | 11,406 | 24,899 | + 118% |
| U.S. | 5,309 | 7,758 | + 46% |
| Other | 1,980 | 3,226 | + 63% |
| 1-800 Number: | | | |
| Canada | 2,752 | 1,583 | + 33% |
| U.S.A. | 4,587 | 6,124 | - 42% |
| Number of Motorcoaches | 1,529 | 2,107 | + 38 % |
| Ontario | 995 | 1,590 | + 60 % |
| Other | 78 | 1,224 | + 213 % |

* Please note the 1993 figures have been adjusted.

TOURISM

SALES and MARKETING INITIATIVES

The following programs were undertaken by Tourism and Convention Services in 1994 as detailed in the Division's marketing plans:

Celebrate Program - "Greater Hamilton--Discover the Festive Region"

The "Celebrate" concept is a five year marketing program which uses selected themed festivals and events as anchor attractions over the summer months. These festivals encourage tourists to visit Greater Hamilton and to extend their stay. The area hotels have developed packages which promote "value added" programs with local attractions and facilities.

Festivals

The Department produces two key festivals for the Celebrate Program:

The Greater Hamilton Tattoo

For the third consecutive year Tourism and Convention Services has hosted the Greater Hamilton Tattoo. Held on Saturday, June 4, 1994 at Copps Coliseum, guest performers included the USMS Hell Cats (Westpoint), Maritime Command Naval Gun Run Demonstration Team, and The Royal Marines Association Band (Concert Band of Coburg). More than 2800 performers participated in the four hour production. The Tattoo attracted 8000 visitors. Total economic impact for the Greater Hamilton Tattoo was \$459,571.00.

Aquafest

The Westbury Canadian Life Greater Hamilton Aquafest took place at the Hamilton Harbour on July 23 and 24, 1994. More than 200 activities took place which attracted a large audience of about 100,000. Total economic impact for the Greater Hamilton Aquafest was \$2,870,009.

Professional Development Seminars

Staff attended the following professional development seminars in 1994:

- Canadian Tourism Outlook
- Festivals Ontario
- International Festivals Association
- JITA Seminar (Working with the Japanese Market)
- National Tour Association Marketing Seminar
- Tourism Industry Association of Canada

Committees

The Tourism Division offers assistance to both the tourism and business industry by attending and actively participating on committees. (Refer to Supplemental Report.)

Brochure Development

Produced consumer and travel trade brochures to encourage visitation to Greater Hamilton such as the Celebrate brochure, Group Planners Guide, Dining Guide, Accommodation Guide and the bi-annual Events Guide.

Marketing Initiatives

- organized a Greater Hamilton Marketplace Blitz with fifteen industry partners to sell product to the Greater Toronto market.
- research for development of eco-tourism market and comprehensive brochure to be ready in early '95.
- development of Festivals and Events Package.
- aided local hotels in the development of brochure packages with the Japanese and North American travel trade industry.
- updated Tourism and Convention Services display booth and photographs.
- provided liaison services with step-on-guides and tour operators.
- participated in City of Hamilton's first Sustainable Development Day trade show.
- developed itineraries to assist tour operators with promoting group travel to Greater Hamilton.
- organized eight familiarization (fam) tours for operators as an effective means of promoting Greater Hamilton as a group tour destination.
- attended thirteen travel trade and consumer marketplaces promoting the many area attractions in Greater Hamilton.
- executed a comprehensive schedule of media initiatives undertaken to promote Greater Hamilton tourism.
- administered the Greater Hamilton Events Line Spec-Tel. Spec-Tel is an electronic voice recording accessed by telephone. Spec-Tel recorded 9,707 calls in the first ten months of 1994.
- conducted tourism presentation to local high schools, associations and service clubs. Liaised with OTEC (Ontario Tourism Education Council) re: video presentations.
- fulfilled 63 requests for local Step-On-Guide Service (City Hall, downtown walking tours, city bus tours)
- the Department continues to require and acknowledge the support of the Lady Hamilton Club to help with servicing visitors at the Downtown Tourist Information Centre, conventions and special events.
- distributed the Celebrate '94, lure, dining, accommodation and event guides and local map throughout the local community, southern Ontario and U.S. border states.
- compiled Special Events listing monthly and distributed to media, libraries and other information centres requiring "up to the minute" event information.
- created "Thematic Itineraries" to attract, develop and promote an international tourist market.
- continued to encourage the local tourism industry to present a unified brand image by using the Region's tourism logo and slogan "Discover the Festive Region".
- scheduled the Region's tourism mascot "SOHO" at several activities throughout the Region.
- co-sponsored with United Way the public message board located at Main and Dundurn (formerly Firestone Board) to advertise festivals, events and conventions in the Region.

TOURISM

TOURISM SERVICES

Tourism Centres

The Tourism Division continues to operate and assist in running five tourist information centres in the Hamilton-Wentworth Region.

1994 Visitor Statistics

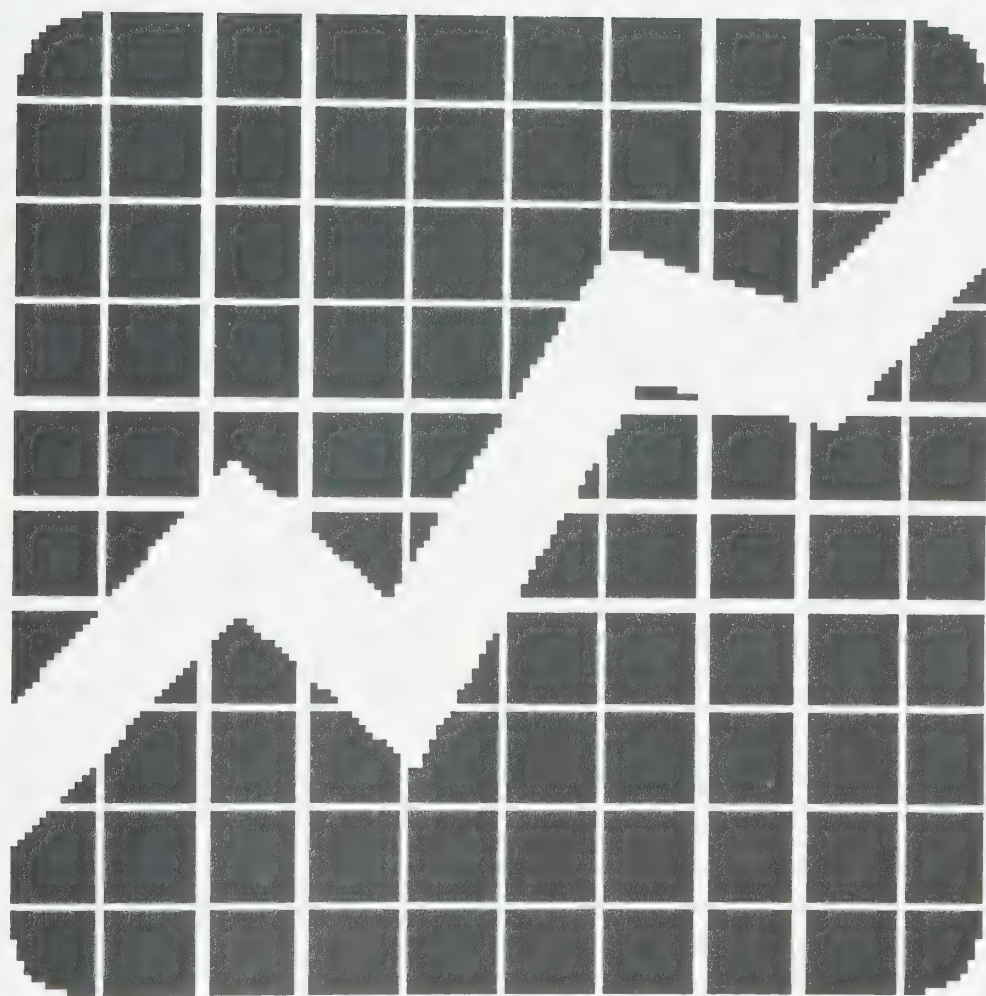
| Operated Centre | 1993 | 1994 | +/- % |
|-------------------------|--------|--------|--------|
| African Lion Safari | 7,687 | 7,743 | + 1% |
| Downtown | 4,075 | 10,298 | + 153% |
| Royal Botanical Gardens | 2,587 | 6,359 | + 146% |
| Fifty Road | 4,346 | 11,984 | + 176% |
| Total | 18,695 | 36,384 | + 95% |
| Origins of Visitors: | | | |
| Canada | 11,406 | 20,036 | + 76% |
| U.S.A. | 5,309 | 7,758 | + 46% |
| Other | 1,980 | 3,226 | + 63% |

N.B. The Flamborough Tourist Information Centre confirmed 3,872 visitors for the 1994 summer season.

Special Projects

- hosted the 1994 Festivals Ontario Conference
- partnered with Industry Canada in presenting a seminar on dealing with the Tour Operator
- developed and administered a project through CEIC (Canada Employment and Immigration Centre) to hire and train special events assistants

1994 SUPPLEMENTAL REPORT



ECONOMIC DEVELOPMENT DEPARTMENT

LOCAL MARKET ACTIVITIES

Visitations 1994

The visitation program, in combination with the department's satellite offices, is the primary means by which the Economic Development department services the non-residential component of the Region's assessment base. The visitation program is focused on the expansion and retention of local business. In addition, staff are able to determine the major issues confronting area businesses and recommend solutions and programs to Committee and Council. The following table illustrates the totals for the 1994 program:

| Municipality | # of Visits | (as a) % | * Companies | (as a) % |
|--------------|-------------|----------|-------------|----------|
| Totals | 650 | 100.0 | 14,791 | 100.0 |
| Ancaster | 74 | 11 | 429 | 2.9 |
| Dundas | 17 | 3 | 532 | 3.6 |
| Flamborough | 49 | 8 | 709 | 4.8 |
| Glanbrook | 20 | 2 | 247 | 1.6 |
| Hamilton | 337 | 52 | 11,087 | 74.9 |
| Stoney Creek | 154 | 24 | 1,787 | 12.0 |

* These figures represent 1989 businesses in Hamilton-Wentworth to indicate proportionate distribution of Region businesses by municipality.

N.B. The satellite program is the assigning of staff to area municipalities on a one or two day per week basis. Visitations are initial, pro-active client calls to local companies.

NEW JOBS

The following table records new companies that have established operations in the Region as a result of Economic Development department efforts:

| <u>COMPANY</u> | <u>NEW JOBS</u> | <u>MUNICIPALITY</u> |
|-----------------------------------|-----------------|---------------------|
| Autocut | 3 | Hamilton |
| Blue Ribbon Rentals* | 10 | Hamilton |
| Business Depot | 20 | Hamilton |
| Careers For A Better World | 2 | Hamilton |
| Comte | 4 | Hamilton |
| Duke Steel | 50 | Stoney Creek |
| Enviroscope International/Britech | 3 | Hamilton |
| Fastenal* | 10 | Stoney Creek |
| Lindstrom Beer and Wine Supplies | 5 | Hamilton |
| Ontario Hydro | 20 | Stoney Creek |
| Pentash (Cineplex)* | 50 | Hamilton |
| Surflex* | 20 | Hamilton |
| Transamerica Financial | 3 | Hamilton |
| Transport Canada | 30 | Glanbrook |
| Philip Utilities Management Co. | 10 | Hamilton |
| Totals | 230 | |

* These companies were previously located outside of the Region and have since located in the Hamilton-Wentworth Region.

BUSINESS DEVELOPMENT SUPPLEMENT

JOBS EXPANDED and RETAINED/RELOCATED

The following companies, assisted by the Economic Development department, have either expanded or maintained their current employment levels as of December 1994:

| <u>COMPANY</u> | <u>EXPANDED</u> | <u>RETAINED/ RELOCATED</u> | <u>MUNICIPALITY</u> |
|---------------------------|-----------------|--------------------------------|---------------------|
| Aberdeen Surgical | | 12 | Hamilton |
| Acclaim Lawn Care | | 3 | Flamborough |
| Activation Labs | 2 | 14 | Ancaster |
| Arcor PVC Windows | | 50 | Stoney Creek |
| Barton Air Fabricators | | 35 | Hamilton |
| Bella Pasta | 71 | | Hamilton |
| Burns Fry | | 15 | Stoney Creek |
| C.B. Elite Realty | | 12 | Dundas |
| Campli Metals | 5 | | Stoney Creek |
| Canada Kiosk Corp. | | 15 | Ancaster |
| Canway Equipment Mfg. | | 20 | Ancaster |
| Com Car Ltd. | 5 | | Ancaster |
| Dalpro Industrial | 5 | | Stoney Creek |
| Dial-A-Rush Courier | | 20 | Hamilton |
| Economical Mutual Life | | 50 | Hamilton |
| Golder and Associates | | 15 | Hamilton |
| KG Custom Fabricating | 4 | 17 | Ancaster |
| Kwik Kard | | 2 | Stoney Creek |
| Magic Base Foot Institute | | 4 | Stoney Creek |
| Magic Pantry Foods | | 40 | Hamilton |
| Maple Leaf Foods | 15 | 135 | Hamilton |
| Mountainview Poultry | | 20 | Hamilton |
| Narrowflex | 20 | 85 | Stoney Creek |
| Nature's Way Development | | 4 | Hamilton |
| Paling Industries | 30 | | Hamilton |
| Second Cup | | 10 | Hamilton |
| Star Brand Packers | 10 | 25 | Glanbrook |
| Techmatic | | 4 | Ancaster |
| Wescam | 45 | 45 | Flamborough |
| Totals | 212 | 652 | |

SMALL BUSINESS AND ENTREPRENEURSHIP

Business Advisory Centre (BAC)

The Regionally and provincially funded Business Advisory Centre was established to assist and counsel entrepreneurs and small business within the Region. The BAC is comprised of four main components:

- 1) **Self-Help Centre** - assistance for new business start-ups
- 2) **Mentorship program** - consulting service for small business utilizing professionals volunteered by local companies
- 3) **GHTEC** - a technology incubator for small business
- 4) **Entrepreneurial Skills Program** - a federal/provincial program to train UIC and SAR individuals in starting their own enterprises.

Entrepreneurial Programs Division

Since April 22 of 1993, 425 unemployment recipients, social assistance recipients and long term unemployed individuals have taken part in the program. As of November 30, 1994 there were 343 businesses in operation. These businesses have since hired an additional 129 people and generated sales in excess of \$8 million.

BAC Annual Activity Report

The following table indicates the BAC activity levels for 1994:

| Indicator | 1991 | 1992 | 1993 | 1994* |
|---------------------------|-------|--------|--------|--------|
| Appointments | 291 | 555 | 484 | 633 |
| Business Start-ups | 429 | 1,030 | 962 | 1,135 |
| Currently Operating | 312 | 517 | 449 | 570 |
| Information Inquiries | 3,905 | 9,525 | 9,937 | 10,129 |
| Phone Consultations | 450 | 865 | 823 | 915 |
| Start-up Kits Distributed | 2,072 | 2,881 | 3,471 | 3,714 |
| Total No. of Clients | 4,646 | 10,945 | 11,243 | 11,633 |

* 1994 totals do not include figures for December 1994.

Source: Business Advisory Centre, Hamilton-Wentworth, 1994

Business Sectors into which New Clients Enter or Currently Exist

| Industry | 1991 | 1992 | 1993 | 1994 |
|---------------|------|------|------|------|
| Manufacturing | 35% | 26% | 18% | 23% |
| Retail | 24% | 19% | 21% | 22% |
| Service | 41% | 55% | 61% | 55% |

Source: Business Advisory Centre, Hamilton-Wentworth, 1994

CONSTRUCTION AND DEVELOPMENT

BUILDING PERMITS

Building permit activity in the Region continues to show improvement since the recession. The total value of building permits for 1994 was \$311.8 million.

Building Permits by Sector (\$)

| Indicator | 1990 | 1991 | 1992 | 1993 | 1994 |
|---------------|-------------|-------------|-------------|-------------|-------------|
| Industrial | 122,011,642 | 23,406,285 | 12,021,389 | 13,155,289 | 25,195,431 |
| Commercial | 87,986,154 | 40,717,610 | 50,258,140 | 40,626,058 | 29,732,135 |
| Residential | 262,324,247 | 184,122,352 | 189,376,265 | 245,064,352 | 196,018,874 |
| Institutional | 100,626,744 | 38,410,069 | 33,921,150 | 53,713,972 | 47,964,352 |
| Total Value | 572,948,787 | 294,025,287 | 285,576,944 | 352,559,671 | 298,910,792 |

Building Permits by Municipality, Year-End 1994

| Municipality | Industrial | Commercial | Institutional | Residential | Total |
|--------------------|------------|------------|---------------|-------------|-------------|
| Ancaster | 120,460 | 944,500 | 155,000 | 16,994,820 | 18,214,780 |
| Dundas | 0 | 472,000 | 240,000 | 16,691,000 | 17,403,000 |
| Flamborough | 3,006,660 | 657,630 | 2,105,985 | 44,336,871 | 50,107,146 |
| Glanbrook | 0 | 99,000 | 967,000 | 7,845,000 | 8,911,000 |
| Hamilton | 18,330,311 | 26,111,005 | 40,667,367 | 69,694,183 | 154,802,866 |
| Stoney Creek | 3,738,000 | 1,448,000 | 3,829,000 | 40,457,000 | 49,472,000 |
| Hamilton-Wentworth | 25,195,431 | 29,732,135 | 47,964,352 | 196,018,874 | 298,910,792 |

Source: Area Municipality Building Departments, 1994

1994 Sample of Major Construction Projects and their Building Permit Value

- Hamilton**
- Hamilton-Wentworth Separate School Board, Wentworth Street, Institutional → \$18,000,000
 - Board of Education/City of Hamilton, Institutional → \$8,400,000
 - PCI - Hilton, Wilcox Street, Industrial → \$8,000,000
 - Board of Education/City of Hamilton, (alterations) Institutional → \$1,753,000
 - ITMP Management, Upper James, Commercial → \$1,750,000
 - Maple Leaf Foods, (alterations) Industrial → \$1,700,000
 - Riccio Developments Inc., Upper James, Commercial → \$1,364,000
 - Paletta International Corp., Brampton Street, Industrial → \$960,000
 - Hamilton Municipal East Mountain Credit Union, Limeridge Road, Commercial → \$1,010,000
 - Rosart Properties, Upper James Street, Commercial → \$900,000

- Glanbrook**
- Township of Glanbrook, Binbrook, Institutional → \$912,000

DEMOGRAPHICS

Regional Population Growth

| Municipality | 1986 | 1991 | 1994 | % Change 86-94-94 |
|--------------------|---------|---------|---------|-------------------|
| Ancaster | 17,264 | 21,988 | 23,500 | 36.12 |
| Dundas | 20,118 | 21,868 | 21,900 | 8.86 |
| Flamborough | 26,142 | 29,616 | 31,000 | 18.58 |
| Glanbrook | 9,592 | 9,726 | 9,500 | 0.96 |
| Hamilton | 306,734 | 318,499 | 323,300 | 5.40 |
| Stoney Creek | 43,548 | 49,970 | 52,200 | 19.87 |
| Hamilton-Wentworth | 423,398 | 451,655 | 461,400 | 8.98 |
| Hamilton CMA | 561,471 | 599,760 | 618,000 | 10.07 |

Source: Statistics Canada, 1986 and 1991 Census Data and 1994 Canadian Markets

EMPLOYMENT SUMMARY

Labour Force Summary

| Indicator | 1990 | 1991 | 1992 | 1993 | 1994 |
|---------------------------|---------|---------|---------|---------|---------|
| Population (15 yrs. plus) | 474,000 | 480,667 | 488,667 | 497,667 | 504,583 |
| Labour Force | 337,583 | 328,417 | 325,250 | 326,333 | 337,917 |
| Employed | 316,417 | 296,333 | 291,167 | 288,333 | 309,917 |
| Unemployed | 21,000 | 32,200 | 34,167 | 37,750 | 28,083 |
| Not in Labour Force | 136,417 | 152,250 | 163,417 | 171,334 | 166,666 |
| Participation | 71.2% | 68.4% | 64.2% | 67.2% | 67.0% |
| Unemployment rate: | | | | | |
| Hamilton, CMA | 6.3% | 9.8% | 10.5% | 11.6% | 8.3% |
| Ontario | 6.3% | 9.7% | 11.1% | 10.4% | 9.6% |
| Canada | 8.1% | 8.5% | 11.5% | 11.0% | 10.4% |

Source: Statistics Canada 1994; Labour Market Information Unit, Human Resource and Development Canada, Hamilton

ECONOMIC INDICATORS

Bankruptcies

| Type | 1990 | 1991 | 1992 | 1993 | 1994 |
|----------|------|-------|-------|-------|------|
| Business | 115 | 195 | 153 | 219 | 139 |
| Consumer | 590 | 1,576 | 1,282 | 1,478 | 965 |

Source: Industry and Science Canada, 1990-1994

Hamilton-Wentworth Housing Starts

| Municipality | 1990 | 1991 | 1992 | 1993 | 1994 |
|--------------------|-------|-------|-------|-------|-------|
| Ancaster | 166 | 59 | 114 | 162 | 153 |
| Dundas | 111 | 121 | 126 | 225 | 121 |
| Flamborough | 74 | 77 | 142 | 614 | 428 |
| Glanbrook | 55 | 39 | 105 | 72 | 77 |
| Hamilton | 1,502 | 926 | 824 | 662 | 713 |
| Stoney Creek | 473 | 293 | 482 | 320 | 469 |
| Hamilton-Wentworth | 2,381 | 1,515 | 1,793 | 2,055 | 1,961 |

Hamilton-Wentworth Housing Completions

| Municipality | 1990 | 1991 | 1992 | 1993 | 1994 |
|--------------------|-------|------|-------|-------|-------|
| Ancaster | 171 | 34 | 118 | 111 | 185 |
| Dundas | 168 | 6 | 88 | 98 | 249 |
| Flamborough | 151 | 22 | 169 | 464 | 462 |
| Glanbrook | 60 | 5 | 47 | 96 | 63 |
| Hamilton | 1,273 | 403 | 877 | 594 | 1,003 |
| Stoney Creek | 530 | 294 | 386 | 478 | 370 |
| Hamilton-Wentworth | 2,353 | 764 | 1,685 | 1,841 | 2,332 |

Source: Canada Mortgage and Housing Corporation, Housing Market Information System, 1994

BUSINESS DEVELOPMENT SUPPLEMENT

Residential Real Estate Activity

| Indicator | 1990 | 1991 | 1992 | 1993 | 1994 |
|-------------------|---------|---------|---------|---------|---------|
| Listings (Total) | 36,238 | 36,187 | 32,767 | 29,835 | 27,716 |
| Sales (Total) | 7,745 | 8,350 | 9,049 | 8,199 | 8,817 |
| Volume (Millions) | 1,299.3 | 1,356.9 | 1,370.5 | 1,185.1 | 1,302.3 |

Source: Metropolitan Hamilton Real Estate Board, Summary of MLS Sales Media Report, 1989-1994

Regional Welfare Assistance

| Average/Month | 1990 | 1991 | 1992 | 1993 | 1994 |
|-----------------------|--------|--------|--------|--------|--------|
| Beneficiaries | 14,207 | 20,947 | 27,900 | 28,586 | 28,210 |
| Caseload | 8,224 | 11,888 | 16,190 | 17,133 | 16,503 |
| Ratio of Persons/Case | 1.90 | 2.32 | 1.72 | 1.67 | 1.71 |
| Percentage Population | 3.00 | 4.36 | 6.30 | 6.32 | 6.24 |

Source: Regional Department of Social Services

Canadian Bond Rating

| Indicator | 1990 | 1991 | 1992 | 1993 | 1994 |
|-----------|------|------|------|------|------|
| Rating | AAA | AAA | AAA | AA+ | AA+ |

Source: Canadian Bond Rating Service, 1989-1994

Regional Taxable Assessment (Millions)

| Indicator | 1990 | 1991 | 1992 | 1993 | 1994 |
|-------------------------|---------|---------|---------|---------|---------|
| Residential | 838.4 | 863.1 | 887.1 | 897.2 | 913.5 |
| Commercial/Industrial | 507.5 | 518.6 | 504 | 501.7 | 493 |
| Total | 1,345.8 | 1,381.7 | 1,391.1 | 1,398.9 | 1,406.5 |
| % Commercial/Industrial | 37.7 | 37.5 | 36.2 | 35.9 | 35.1 |

Source: Regional Department of Finance, 1989-1994

BUSINESS DEVELOPMENT SUPPLEMENT

Regional Tax Levies (\$ Millions)

| Indicator | 1990 | 1991 | 1992 | 1993 | 1994 |
|---|-------|-------|-------|-------|-------|
| Total Levies | 138.5 | 152.9 | 159.5 | 164.9 | 165.7 |
| Assessment Growth (%) | 2.98 | 2.63 | 0.45 | 0.52 | 0.54 |
| Increased Revenues (attributable to tax assessment growth) | 3.53 | 3.64 | .688 | .829 | .891 |

Source: Regional Department of Finance, 1989-1994

Per Capita Personal Income

| Indicator | 1990 | 1991 | 1992 | 1993 | 1994 |
|--------------------|--------|--------|--------|--------|--------|
| Hamilton CMA Total | 19,300 | 20,300 | 21,600 | 19,200 | 19,400 |
| Ontario | 19,100 | 20,600 | 21,900 | 19,800 | 19,800 |
| Canada | 16,500 | 18,000 | 19,200 | 17,600 | 17,900 |

Source: Financial Post Canadian Markets, 1990-1994

Total Personal Income (\$ Millions)

| Indicator | 1991 | 1992 | 1993 | 1994 |
|--------------------|-----------|-----------|-----------|-----------|
| Hamilton CMA Total | 12,158.5 | 13,172.5 | 11,828.3 | 11,978.9 |
| Ontario | 203,128.5 | 219,662.8 | 206,485.2 | 209,799.7 |
| Canada | 483,043.2 | 520,257.0 | 495,182.9 | 510,125.1 |

Source: Financial Post Canadian Markets, 1990-1994

LABOUR FORCE

Reported Layoffs

Based on the Ministry of Labour's Monthly Reports on Permanent and Indefinite Layoffs, the Hamilton-Wentworth Region experienced layoffs totalling 1,038 employees. This figure reflects companies whose employee base is greater than 50 employees. This figure does not include any information on temporary layoffs (those of a duration of 13 weeks or less), but does include those firms which weathered partial or complete closures and reduced operations.

Statistics summary on permanent or indefinite layoffs and establishments reporting future permanent or indefinites layoffs (50 or more employees):

| Name of Firm | Location | Type of Cutback | Jobs Affected |
|------------------------------|----------|-----------------|---------------|
| Camco Inc | Hamilton | reduced | 133 |
| Dofasco Inc. | Hamilton | reduced | 760 |
| GSW Heating Products Company | Hamilton | reduced | 80 |
| North American Trust | Hamilton | complete | 65 |

| Name of Firm | Location | Type of Cutback | Month | Jobs Affected |
|-------------------------------|----------|-----------------|----------|---------------|
| Beaver Lumber Company Limited | Hamilton | complete | Jan. '95 | 61 |

Source: Ministry of Labour, Reports on Permanent and Indefinite Layoffs in Ontario, 1994

ADMINISTRATION INITIATIVES

The provision of appropriate support staff, staff training and equipment to facilitate a well organized and efficient operation of the Economic Development Department continues to be exercised through a variety of programs.

Operating Budget

The net expenditure for the 1994 Economic Development Current budget totalled \$ 3,524,370.00. Budgetary restraints are continuously in place to identify areas of possible savings to mitigate the Regional deficit.

Staff Positions

Implementation of the Job Evaluation Programme continues to be affected with the Pay Equity Act and applied to all jobs coming within the Union bargaining unit. Pay Equity adjustments proceeded and adjustments will continue to be made.

Office Equipment

In order to maximize efficiency in communication, maintaining records and information retrieval and to reflect a more professional image for presentations and correspondence, the Department is expanding computer capabilities in the areas of data base management and desk-top publishing.

Educational Seminars

A corporate training needs assessment is currently being conducted; the assessment findings will be presented to Senior Management Team in March of 1995. In the interim, Regional in-house seminars attended by staff in 1994 included CPR, First Aid, Defensive Driving, AMS (Attendance Management System) training, and DBS (Dun & Bradstreet-accounting software) training.

Professional Development

Staff members attended the following courses through Mohawk College or McMaster University: Managerial Communications, Desktop Publishing with Ventura, DBase IV, Micro Computers, Marketing I, and Business Finance & Control.

Staff members also enrolled in courses which lead to degrees and professional designations, i.e. Economic Development Program courses at the University of Waterloo.

CONVENTION SALES AND SERVICING

1994 Convention/Event Bid Submissions and their Status as of December 31, 1994

Bids Confirmed

1. Association of Municipal Clerks and Treasurers of Ontario, 1999
2. Canadian Society of Association Executives Annual Conference
3. Canadian Society of Forensic Science
4. Canadian Society of Clinical Chemists
5. Canadian Public Works Association Conference
6. Canadian Public Relations Society
7. Canadian Association of Chiefs of Police National Convention
8. Canadian Urban Transit Association Fall Conference and Trade Show
9. Canadian Coastal Forces Veterans Association Reunion
10. Canadian Football League Grey Cup, 1996
11. Canadian Catholic School Trustees Association Annual Conference
12. Canadian Junior/Juvenile Golf Championship
13. Canusa Fund Raising Slo-Pitch Tournament
14. Conjoint Meeting on Infectious Diseases
15. Hamilton Touch Football Association Trillium Tournament
16. International Association of Arson Investigators Annual General Meeting
17. Kenneth Copeland Ministries
18. North American Olympic Boxing Qualifying Tournament
19. Ontario Building Officials Association
20. Ontario Novice Lacrosse Championships
21. Ontario Non-Profit Housing Association Convention
22. Prospect Ontario Conference
23. Slo-Pitch Ontario Provincial Championships, 1996
24. Slo-Pitch Ontario Provincial Championships, 1995
25. St. Lawrence/Great Lakes Mayor's Conference
26. Team Canadian Tire Provincial Cup Hockey presented by Labatt's Blue Light
27. Toyota Canadian Professional Figure Skating Championships
28. United Church Hamilton Conference
29. University Choral Festival
30. World Karate Championships

Bids Lost

1. Drug Trading Company Trade Show
2. Economic Developers Association of Canada
3. Festivals Ontario Conference '95
4. Holstein Association of Canada
5. International Festivals Association
6. International Family Congress
7. Life Outreach International
8. Ontario Crown Attorneys' Association
9. Ontario Real Estate Association
10. Ontario Pharmacists Association
11. PC Party of Canada National Convention
12. Professional Engineers Association
13. Radio/Television News Directors Association
14. World Womens' Hockey Championships

Bids Outstanding

1. Aggregate Producers Association of Ontario
2. American Industrial Hygiene Association, July 1995
3. American Industrial Hygiene Association, March 1995
4. Canadian Indigenous Studies
5. Canadian Institute of International Affairs
6. Canadian Figure Skating Championships
7. Canadian Precision Figure Skating Championships
8. Canadian Owners and Pilots Association
9. Christian Booksellers Association
10. Labatt Provincial Hockey Qualifying Tournament
11. Midwestern Ontario District of Optimists International
12. Ontario Turfgrass Symposium
13. Ontario Chiropractic Association
14. World Indoor Lacrosse Championships

1993 Convention/Event Bid Submissions and their Status as of December 31, 1994

Bids Confirmed

1. Canadian Technical Training Corps Reunion
2. Civitan Region 5 Convention
3. Scottish Soccer Festival
4. Slo-Pitch Ontario Provincial Championships, 1994

Bids Lost

1. Alliance of Canadian Travel Associations
2. Association of Municipal Clerks and Treasurers of Ontario, 1996
3. Canadian Celiac Association
4. Canadian Office Machine Dealers Association
5. Canadian Olympic Association Quadrennial Meeting
6. Canadian Society of Association Executives - Winter Management Conference
7. Gideons International In Canada
8. Insurance Adjusters Association of Ontario
9. Ministry of Economic Development and Trade
10. National Recreation Facilities Association
11. Ontario Association of Non-Profit Homes and Services
12. Ontario Cattlemens' Association, 1995
13. Ontario Marina Operators
14. Ontario Sewer and Watermain Contractors
15. PC Party of Ontario - AGM
16. Soil and Water Conservation Society

Bids Outstanding

1. Canadian Association of Journalists
2. Canadian Parking Association
3. Canadian Parks and Recreation Association
4. First Annual Conference on Road Safety
5. International Institute Peace through Tourism (Ontario Workshop)
6. Ontario Urban Transit Association
7. National Association of Mathematics Educators

Convention/Event Attendance Building 1994

1. 1996 Grey Cup
2. Biometric Conference
3. Canadian Broadcasters Association
4. Canadian Chamber of Commerce
5. Canadian Country Music Association
6. Federated Women's Institute
7. Hamilton Insurance Women's Association
8. International Science and Engineering Fair
9. Kinsmen/Kinette National Convention
10. Model T - Ford Convention
11. Ontario Ringette Association
12. Optimists Central Ontario District
13. Ontario TOPS PRD
14. Ronald McDonald Conference
15. Royal and Select Master Masonic Lodge

Computerized Registration Program

A generic registration program is made available to all conventions/events held in Greater Hamilton not presently utilizing a custom registration program. Economic Development loaned this program to the following conventions/events:

Canadian Port and Harbour Association (1994)
International PBX Telecommunications Seminar (1994)
Society of Creative Anachronism Crown Tournament (1994)
Canadian Catholic School Trustees Association (1995)
Canadian Hard of Hearing Association (1995)
Eastern Provincial Jr. Achievement 1995
Lupus Society of Hamilton (1995)
Ontario Tops PRD (1995)
Deaf Baptists Association (1996)

Host Committees

Staff are involved in Host Committees for Conventions/Events, which include the following:

- 4th Annual Labatt Slo-Pitch Provincial Championships
- 10th Annual Society of Aerosol Medicine 1995
- 23rd International Children's Games
- Canadian Association of Fire Chiefs
- Canadian Association of Laboratory Animal Sciences
- Canadian Port and Harbour Association
- Festivals Ontario Conference
- Hamilton-Wentworth Access Awareness Conference 94/95
- Humour Conference 1995
- International Liszt Association
- International Science and Engineering Fair 1995
- Macedonian Orthodox Diocese Convention
- Mayors Great Lakes/St. Lawrence Conf. 1995
- Municipal Law Officer Association
- National SKAL Club of Canada Congress
- Ontario Museums Association
- Ontario Special Olympics
- Ontario Municipal Social Services Assoc. 1995
- Ontario Tops Annual Conference 1995
- Optimist Central Ontario District Convention
- Prospect Ontario Marketplace 1995
- Sustainable Development Day 94/95
- World Curling Championships 1996

CONVENTIONS SUPPLEMENT

Transportation Assistance

Delegate/attendee shuttle buses and passes were offered to several conventions/events as an incentive to host their convention/event in Greater Hamilton as listed below:

1. 25th Congress of Canadian Engineering Students
2. 5th International Conference on Computerized and Quantitative EMG
3. Annual Urban Transit Hockey Tournament
4. Association of Municipalities of Ontario
5. Association of Canadian Clubs
6. Automotive Parts Manufacturer's Association of Canada
7. Canadian Country Music Association
8. Canadian Society for Transfusion Medicine
9. Canadian Football Hall of Fame
10. Canadian Union of Public Employees - Ontario Division
11. Canadian Association of Research Libraries
12. Canadian Library Association
13. Canadian Association of Academic Surgeons
14. Canadian Figure Skating Championships
15. Committee Against Racial Discrimination
16. Innovative Farmers No Till/Ridge Till Workshop
17. Intercessors for Canada
18. International Association on Water Pollution Research and Control
19. Knights of Columbus (French Group)
20. Laubach Literacy Canada
21. Municipal Electric Association
22. National Aids Awareness
23. National Judo Championship
24. National Campus and Community Radio Association - Ontario Regional Conference
25. NHL Referees Training Camp
26. Ontario Veterinary Medical Association
27. Ontario Garden and Flower Festival
28. Ontario Association for Community Living
29. Ontario Fruit and Vegetable Growers
30. Ontario School Counsellors Association
31. Royal Canadian Air Force (W.D.) Reunion
32. Royal Canadian Air Force Association
33. Royal Canadian Legion (Ontario Provincial Command)
34. Steelway Building Systems National Sales Meeting
35. Supreme Council Scottish Rite
36. United Empire Loyalists
37. United Rubber Workers of America
38. World Judo Championships

TOURISM SALES AND MARKETING INITIATIVES

CELEBRATE PROGRAM - GREATER HAMILTON DISCOVER THE FESTIVE REGION

The "Celebrate" concept is a five year marketing program which uses selected themed festivals and events as anchors over the summer months, to encourage tourists to visit Greater Hamilton. The primary goal of the program is to increase extended stays in the Region. Hotels have developed packages which promote "value added" programs with local attractions and facilities.

As with Celebrate '93, a number of co-operative packages were developed. The success of the program is dependent on the participation of our partners to offer potential visitors a wide choice of events, attractions and accommodations. For 1994, a number of financial partnership opportunities were offered to our local tourism industry. Twenty-four industry partners were involved in co-op programs with the Region.

The Celebrate program employs the use of the following media:

- Newspaper
- Radio
- Brochures

Support tools include:

- fam tours
- direct sales

U.S. Markets

A multi-media campaign took place between the months of June and August 1994, in selected U.S. markets that provide the greatest opportunity to attract overnight visitors. The markets covered in 1994 were as follows:

- Buffalo, Rochester and Syracuse, New York
- Michigan State

Canadian Markets

The Celebrate brochures was inserted in Metroland (weekly) newspapers in the third week of May. The areas covered were Brampton, Etobicoke, Milton, Mississauga, Newmarket, Sarnia, Scarborough, and Windsor.

Local Markets

The Celebrate brochure was distributed to 172,000 households throughout the Region in the Spectator. Distribution date was Friday, May 27, 1994.

Statistical results are as follows:

• Festival Economic Impact were up by 48% over 1992.

| 1992 | 1993 | 1994 |
|-------------|--------------|--------------|
| \$13,488,21 | \$22,669,906 | \$33,900,999 |

- 1-800 U.S. Calls decreased by 42%. This is attributable to the shift in marketing from U.S. border states to Southern Ontario.
- 1-800 Canadian Calls increased by 33%.
- Mail Inquiries decreased during this period

TOURISM SUPPLEMENT

Visitors - Tourism Centres increased by 65%

| 1993 | 1994 |
|--------|--------|
| 18,892 | 31,220 |

Attraction General Attendance increased by 4%.

Major Festival Attendance increased by 22%

| 1993 | 1994 |
|-----------|---------|
| 499,300 * | 609,094 |

* 1993 figures have been adjusted.

FESTIVALS

The department produces two key festivals for the *Celebrate Program*.

The Greater Hamilton Tattoo

For the third consecutive year Greater Hamilton Tourism and Convention Services has hosted the Greater Hamilton Tattoo. Held on Saturday, June 4, 1994 at Copps Coliseum, guest performers included the USMS Hell Cats (Westpoint), Maritime Command Naval Gun Run Demonstration Team, and The Royal Marines Association Band (Concert Band of Coburg). More than 2800 performers participated in the four hour production. The Tattoo attracted 8000 visitors.

- 37.7% of the audience was from out-of-town
- 93.1% of the above indicated that the Tattoo was the reason they were visiting Greater Hamilton
- 71% indicated the reason for attending the Tattoo was for the overall program
- the average sum of money spent was approximately \$40.00 per person
- average expenditures included \$37.11 on tickets, \$20.72 on food, \$3.75 on programs, and \$14.78 on parking and gas

Total economic impact for the Greater Hamilton Tattoo was \$459,571.

Aquafest

The Westbury Canadian Life Greater Hamilton Aquafest took place at the Hamilton Harbour on July 23 and 24, 1994. More than 200 activities took place which attracted a large audience of about 100,000.

- Most respondents were Hamilton residents between the ages of 26 and 45, with a combined family income of less than \$60,000. They came with family, and had diverse educational backgrounds.
- The respondents liked the music at the festival most of all and the boat rides and tall ship were also very popular.
- The most common complaints were that the site was too large, the goods for sale were expensive, and there were not enough arts and crafts.
- Average daily expenditures were; \$10.06 on food, \$3.74 on arts and crafts, \$1.34 on souvenirs, \$1.99 on rides and activities, and \$1.08 on parking.
- The majority of respondents became aware of Aquafest through the newspaper.

Total estimated economic impact for the Greater Hamilton Aquafest was \$2,870,009.

EVENT BROCHURES

Volume 4, Issues 1 and 2 of the **GREATER HAMILTON EVENTS GUIDE** (January to June) was released for distribution in December 1993 and May 1994. The Events Book is a 68 page document listing Hamilton events by category and date. It is produced through in-house desk-top publishing. Over 500 separate listings are presented. Ten thousand copies are produced and distributed throughout the community, hotels, and tourism centres. It is used extensively by the media, libraries and information centres.

Group Planners Guide

Eight hundred Group Planners Guides were produced for the Travel Trade Industry. The document was typeset in-house utilizing desk-top publishing. Advertising was sold to off-set costs.

SALES BLITZ

June 28 - Greater Hamilton Marketplace

Fifteen Greater Hamilton "tourism partners" exhibited at a marketplace in Toronto on the above date. The marketplace attracted approximately 65 tour operators, travel agents, meeting planners and association executives from the Toronto area. This was a first-time exhibition, and was viewed by all who attended and participated as a great success. The marketplace was held at this time of year in celebration of National Tourism Awareness Week.

FAM TOURS

Fam Tours continue to be an extremely effective means of promoting Greater Hamilton for tourism purposes. We continue to request complimentary admissions, meals, etc. from industry partners when a fam tour is planned. However, Tourism and Convention Services remains a large contributor in off-setting the cost of each fam tour. We maintain this budget as a cost-effective means of showcasing our Region and achieving repeat business.

February

Post-Prospect Ontario Fam Tour

April

Buffalo Travel Writer Fam

May

***Pre-Rendezvous Canada Fam Tour
(two Fams were conducted)***

Lilac Festival Fam

June

Greater Hamilton Tattoo Fam

November

Victorian Christmas Fam Tour

December

Toyota Figure Skating Championship Fam Tour

MARKETPLACES/TRADESHOWS

During 1994, staff attended a total of thirteen (13) tourism shows promoting the many area attractions, hotels, restaurants, and special events. The following is a brief description of each of the events:

The Province of Ontario

- The Greater Hamilton Showcase - Toronto
(Attended by Meeting Planners, Convention Organizers, and the travel trade industry)
- Ontario Motor Coach Association (OMCA) Convention - Toronto
(Attended by Ontario Tour Operators)
- London Free Press Consumer Show - London
(Open to the general public)
- Toronto Travel and Leisure Show - Toronto
(Attended by families and individual travellers)
- Theatre in Ontario Marketplace
(Attended by Tour Operators)
- Only in Ontario Tradeshow
(Attended by Ontario tour operators and media)

The Province of Quebec

- Bienvenue Quebec Marketplace

United States

- Theatre in Ontario Marketplace
- Bienvenue Quebec
- American Bus Association (ABA)
- Only In Ontario Marketplace
- Festival Country Group Promotion
- AAA of Western New York
- Showcase Canada

Overseas Market

- Prospect Ontario Marketplace
- Ontario Marketplace
- Rendezvous Canada

LOCAL INFORMATION SERVICES

Royal Botanical Gardens' Regional Days - August

Tourism and Convention Services set up a display in the Royal Botanical Gardens Headquarters during this week long "open house". Consumers were invited to visit the Gardens and pick up tourist information displayed by the many regions present.

LOCAL AWARENESS

Media

The following local media initiatives were undertaken to promote the Region's tourism product to local citizens:

| | |
|-----------------|---|
| January | Superboard The Spectator Indoor Games - BandW Ad |
| February | Superboard |
| March | Superboard AAA Tour Book - BandW Ad |
| April | Superboard Festivals Ontario Magazine - Back Cover |
| May | Superboard Michigan Living - 1/2 pg 4 colour Where Map - Back Panel 4 colour Airshow Programme Soccer Programme CTM Brochure Distribution - US Market (25,000) CTM Brochure Distribution - Southern Ontario (135,000) Hamilton Spectator - Brochure Insert (172,000) |
| June | Superboard Metroland Papers - Celebrate Insert Sarnia Observer - Celebrate Insert Windsor Star - Celebrate Insert WGRZ-TV - Celebrate WIVB-TV - Celebrate WKBW-TV - Celebrate WHEC-TV - Celebrate WOKR-TV - Celebrate WUHF-TV - Celebrate WIXT-TV - Celebrate WTVH-TV - Celebrate WSYT-TV - Celebrate WBLK-FM - Celebrate Radio WGR-AM - Celebrate Radio WGRF-FM - Celebrate Radio WUFX-FM - Celebrate Radio WBBF-AM - Celebrate Radio |

TOURISM SUPPLEMENT

WBEE-FM - Celebrate Radio
WKLX-FM - Celebrate Radio
WBBS-FM - Celebrate Radio
WFBL-AM - Celebrate Radio
WSEN-FM - Celebrate Radio
WSYR-FM - Celebrate Radio
WYYY-FM - Celebrate Radio
Buffalo News - Celebrate Newspaper Ads

June

Superboard
WGRZ-TV - Celebrate
WIVB-TV - Celebrate
WKBW-TV - Celebrate
WHEC-TV - Celebrate
WOKR-TV - Celebrate
WUHF-TV - Celebrate
WIXT-TV - Celebrate
WTVH-TV - Celebrate
WSYT-TV - Celebrate
WBLK-FM - Celebrate Radio
WGR-AM - Celebrate Radio
WGRF-FM - Celebrate Radio
WUFX-FM - Celebrate Radio
WBBF-AM - Celebrate Radio
WBEE-FM - Celebrate Radio
WKLX-FM - Celebrate Radio
WBBS-FM - Celebrate Radio
WFBL-AM - Celebrate Radio
WSEN-FM - Celebrate Radio
WSYR-FM - Celebrate Radio
WYYY-FM - Celebrate Radio
Buffalo News - Celebrate Newspaper Ads
Hamilton Spectator - Brochure Insert (176,000)

July

Superboard
WGRZ-TV - Celebrate
WIVB-TV - Celebrate
WKBW-TV - Celebrate
WHEC-TV - Celebrate
WOKR-TV - Celebrate
WUHF-TV - Celebrate
WIXT-TV - Celebrate
WTVH-TV - Celebrate
WSYT-TV - Celebrate
WBLK-FM - Celebrate Radio
WGR-AM - Celebrate Radio
WGRF-FM - Celebrate Radio
WUFX-FM - Celebrate Radio
WBBF-AM - Celebrate Radio
WBEE-FM - Celebrate Radio
WKLX-FM - Celebrate Radio
WBBS-FM - Celebrate Radio
WFBL-AM - Celebrate Radio
WSEN-FM - Celebrate Radio
WSYR-FM - Celebrate Radio

WYYY-FM - Celebrate Radio
Buffalo News - Celebrate Newspaper Ads
Canadian Masters Program - Ad

August

Superboard
WGRZ-TV - Celebrate
WIVB-TV - Celebrate
WKBW-TV - Celebrate
WHEC-TV - Celebrate
WOKR-TV - Celebrate
WUHF-TV - Celebrate
WIXT-TV - Celebrate
WTVH-TV - Celebrate
WSYT-TV - Celebrate
WBLK-FM - Celebrate Radio
WGR-AM - Celebrate Radio
WGRF-FM - Celebrate Radio
WUFX-FM - Celebrate Radio
WBBF-AM - Celebrate Radio
WBEE-FM - Celebrate Radio
WKLX-FM - Celebrate Radio
WBBS-FM - Celebrate Radio
WFBL-AM - Celebrate Radio
WSEN-FM - Celebrate Radio
WSYR-FM - Celebrate Radio
WYYY-FM - Celebrate Radio
Buffalo News - Celebrate Newspaper Ads

September

Superboard
Confederation Cup Program - Ad

October

Superboard

November

Superboard

December

Superboard

Events Line - Spec-tel 521-5600

Spec-Tel is an electronic voice recording accessed by telephone. Trunk lines of up-to-date event information are available. Event information, in each category, is changed on a monthly basis.

Total calls in 1994 were approximately 10,000.

COMMITTEES

The Tourism Division offers assistance to both the tourism and business industry by attending and actively participating on the following committees:

American Bus Association's Top 100 Events Selection Committee
Aquafest Environmental Committee
Canadian Public Relations Association - Hamilton Chapter

Confederation Park Cooperative Marketing Committee
Creative Arts Board
Dragon Boat Race Planning Committee
Festival Country Consumer Marketing Committee
Festival Country Tourism Liaison Committee
Festival Country Group Marketing Committee
Festivals Ontario - Board
Festivals Ontario - 1994 Conference
Greater Hamilton Hydroplane Races
Greater Hamilton Tattoo Planning Committee
Hamilton and District Chamber of Commerce Tourism and Hospitality Sub-committee
International Management Group Tourism Study Committee
OMCA Affiliates Committee
Parade of Lights Committee
Prospect Ontario Host City Committee
Region of Hamilton-Wentworth Tourism Advisory Committee
Sesquicentennial Committee for Hamilton
Special Events Advisory Team
The Mum Show Committee
Travel and Tourism Advisory Committee - Mohawk College

Tourism Update Committee

Tourism and Convention Services organizes monthly update meetings with members of the local tourism industry. Approximately 30 industry representatives attend these meetings on a regular basis. The meetings are held at a different property each month. The main purpose of this committee is to share information and ideas about the state of the local tourism industry and for our office to disseminate information about joint participation in upcoming marketplaces/tradeshows and visitor statistics, etc. Guest speakers are invited frequently, to share "tourism" related matters with the Committee.

Presentations

Presentations on a number of tourism related issues are requested from staff throughout the year. In 1994 the following presentations were conducted:

Cathedral High School - Travel and Tourism Class
The Dundas Cactus Festival - Festival and Event Development Fund
The Kinsmen's Club of Hamilton - Presentation on Sponsorship for the Parade of Lights

Skyline

Staff continue to write articles for Skyline on tourism related issues.

Professional Development

Staff attended the following professional development seminars in 1994:

- Canadian Tourism Outlook
- Festivals Ontario
- International Festivals Association
- JITA Seminar (Working with the Japanese Market)
- National Tour Association Marketing Seminar
- Tourism Industry Association of Canada

Awards

The Department received the following award in 1994 as related to the Celebrate Tourism Marketing Program.

- ACE Awards - Celebrate Brochure - Honourable Mention
- Canadian Public Relations Association - Hamilton - Celebrate Brochure - Honourable Mention

TOURISM SERVICES

Information Centres

The downtown tourism centre located at 127 King Street East operates on a year-round basis. This location has proven very beneficial to tourists, conventions, and local residents. Regional tourist information centres at the Royal Botanical Gardens and African Lion Safari opened June 5th and remained open until Labour Day. The Fifty Road Tourism Centre, just north of the Queen Elizabeth Highway, opened May 1. This centre reaches tourists and motorcoaches approaching the Region from the east.

Nine summer counsellors were hired and trained by the Department to staff tourist information centres. Four staff were hired through the GWA social services employment department, three counsellors were provided through the Federal SEED program and two by Festival Country.

Visits to the Downtown Tourism Centre were up by 67%. These included visitors from:

| Canada | United States | Other |
|---------------|----------------------|-----------|
| Alberta | California | Denmark |
| New Brunswick | Connecticut | England |
| Nova Scotia | District of Columbia | France |
| Ontario | Georgia | Germany |
| Quebec | Illinois | Ireland |
| | Kansas | Italy |
| | Maine | Scotland |
| | Massachusetts | Holland |
| | Michigan | Mexico |
| | Montana | Poland |
| | New Hampshire | Denmark |
| | New York | Bermuda |
| | North Carolina | Norway |
| | Ohio | Australia |
| | Oklahoma | Kuwait |
| | Pennsylvania | |
| | Tennessee | |
| | Virginia | |
| | Wisconsin | |

Step-On Guide Service - January to June

City, City Hall, and Walking Tours

Guide Service was offered to visiting motorcoach tours, local clubs and associations. In total, 63 tours were conducted.

Lady Hamiltons

The Department continues to require and acknowledge the support of the Lady Hamilton Club to serve in assisting with servicing visitors at the downtown tourist information centre, conventions and special events. An appreciation tea was held November 28th at Royal Botanical Gardens in recognition of the Lady Hamilton Club's outstanding dedication. Members contributed over 4,000 volunteer hours in 1994.

Brochure Distribution

The Celebrate '94, lure, dining and accommodation guides and local maps were distributed to local and provincial tourism centres, automobile clubs, local hotels and Canadian Consulate Offices. Both the Celebrate '94 and The Greater Hamilton lure were distributed in Western New York State and Southern Ontario by CTM Brochure Distribution Company. Festival Country, Niagara and Mid-Western Ontario Travel Association also distributed the Celebrate brochure to its member and tourist centres.

Special Events Listing

The Special Events listing is compiled on a monthly basis and distributed to media, libraries, and other information centres requiring "up to the minute" event details. This listing covers new events and changes in event information not listed in the bi-annual publication.

New Initiatives

Creation of Themed Itineraries

Participating in marketplaces directed towards overseas groups necessitated the need for themed and packaged itineraries. With the assistance of local and representatives from other regions, we were able to sell effectively in this market.

CEIC - Creative Events and Tourism Development (Job Development)

In February 1993, staff applied for a grant through CEIC (Employment and Immigration Canada) to provide funding to hire four special events assistants and one project manager. The grant was approved in June 1993.

The assistants receive formal training two days per week and on-site work training three days per week. Four assistants were hired and placed in on the-job-training at the Tourism and Convention Services Department of the Region, the Hamilton Philharmonic Orchestra and Creative Arts Inc.

The grant received was approximately \$100,000.

Festivals Ontario Conference

Greater Hamilton hosted the 1994 Festivals Ontario Conference. The conference was a success with the largest delegate registration ever recorded. Staff were responsible for program development, speaker search, social evenings, budgets and registration.

Tourism and Convention Board at Dundurn Street

The message board continues to highlight festivals, events and conventions taking place within the Region. It is expended jointly with the United Way of Hamilton and Burlington. Messages are changed on a weekly basis.



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